

**United States District Court for the Northern District of California**  
***Pro Se* and *Pro Bono* Assistance Project, San Jose**  
**REQUEST FOR PROPOSALS-REVISED 11.9.09**

**Request Date:** October 1, 2009  
**Request Closing Date:** November 16, 2009

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**Special Notes and Instructions:**

1. This is a request by the United States District Court for the Northern District of California (the “court”) for proposals for operation of a *Pro Se* and *Pro Bono* Assistance Project to be located at the San Jose division of the court.
2. **A fixed price award of \$75,000** will be made based on adequacy, quality and comprehensiveness of proposal.
3. Proposals must be emailed or hand delivered to the below listed court representative at the listed address no later than 4:00 p.m. on the Requested Closing Date:

Joan Anyon  
450 Golden Gate Avenue, 16<sup>th</sup> Floor  
San Francisco, CA 94102  
[Joan\\_Anyon@cand.uscourts.gov](mailto:Joan_Anyon@cand.uscourts.gov)

4. A proposal describing the approach, vision and management of the project must be submitted in accordance with the specifications below.
5. The proposal shall be no more than 10 pages in length, single sided and double spaced, and shall address the issues specified below.
6. If the proposal fails to provide the required information or if the information cannot be verified to the satisfaction of the court, the legal services provider’s proposal may be rejected without further consideration.
7. **All questions or clarification requests must be submitted in writing no later than three (3) working days prior to the Request Closing Date, preferably via email, to:**

Joan Anyon  
450 Golden Gate Avenue, 16<sup>th</sup> Floor  
San Francisco, CA 94102  
[Joan\\_Anyon@cand.uscourts.gov](mailto:Joan_Anyon@cand.uscourts.gov)

## **1. TASK DESCRIPTION**

The United States District Court, Northern District of California (the“court”) seeks a legal services provider to assume responsibility for and oversee a *Pro Se* and *Pro Bono* Assistance Project for the U.S. District Court for the Northern District of California, San Jose division.

## **2. BACKGROUND**

The court has entered into an agreement with the Volunteer Legal Services Program (San Francisco) to develop and implement a *pro se* legal assistance project, which serves *pro se* litigants filing, or considering filing, a civil case in the San Francisco/Oakland venue. This project has been operating for less than a year, but preliminary evaluations indicate that the program is successfully meeting the needs of the court and *pro se* litigants. Therefore, the court is considering expansion of such a program to the San Jose division. The San Jose division has significantly fewer civil filings and therefore, the program will likely require somewhat different scaling of services; it is estimated that on-site services would be provided, on a schedule to be determined, for a minimum of the equivalent of two days per week. The court will provide a grant in the amount of \$75,000, which will cover all costs of the project; the funds will be awarded at the outset of the grant period.

## **3. PURPOSE**

The purpose of this request for proposals is to define and procure the services of a legal services provider who will develop and implement a part-time, full-service *pro se* assistance project to serve litigants in the San Jose division of the court.

The *pro se* assistance project may also benefit the court by reducing the administrative burdens associated with serving *pro se* litigants. A high percentage (perhaps as many as 30%) of the *pro se* litigants who file cases in the district court do so based on inadequate or incorrect information as to venue or jurisdiction. *Pro se* plaintiffs also file incorrect pleadings in the court and ask substantive and procedural questions of court personnel, requiring intervention by judges and staff, detracting from other court tasks. Placement of cases with pro bono counsel for full or limited scope representation benefits both the litigants and the court.

## **4. SCOPE**

The proposal should provide a complete budget and estimate the cost of delivery of services for the period of one year, not to exceed \$75,000, the funds allocated by the court for this project. The proposal should indicate an estimate, in number of hours per week, as to how the attorney’s time will be spent.

The legal services provider will designate/employ a staff attorney to work in the San Jose division. It is estimated that on-site services would be provided, on a schedule to be determined, for a minimum of the equivalent of two days per week.

The staff attorney will provide services, including but not limited to:

- Consulting with any *pro se* litigants who are interested in filing or are parties to actions in the San Jose Division
- Providing information at all stages of a case, from pre-filing to post-disposition
- Advising as to drafting and filing motions, providing advice as to substantive issues, assisting *pro se* litigants in preparing for hearings, settlement conferences, mediations, and other appearances, responding to requests from the opposing party, and making strategic litigation decisions
- Assisting, on a limited basis, with the preparation of forms, discovery, pleadings, and other documents
- Explaining court orders, opposition pleadings and discovery, and court rules and procedures
- Collaborating with the court's ADR program in identifying matters appropriate for referral to that program and advising the *pro se* litigant regarding such service
- Screening and identifying cases appropriate for *pro bono* representation, assisting litigants with applying for orders appointing counsel, and placing cases with *pro bono* attorneys for full or limited scope representation
- Referring *pro se* litigants to state bar-approved lawyer referral services, when appropriate, and helping them develop complete, organized, well-framed presentations of their cases to maximize their chances of securing legal counsel on an hourly or contingency-fee basis
- Developing and maintaining lists of legal, governmental, social service, and other agencies and organizations that serve indigent and disadvantaged populations, and referring *pro se* litigants as appropriate
- Preparing educational materials, sample pleadings, forms, checklists, templates, and other such aids to assist *pro se* litigants
- Publicizing services available to potential *pro se* litigants and to various potential referral agencies
- Maintaining relevant records and statistics as to the clients served

The court will provide office space and basic utilities, but the legal services provider will provide all other equipment and supplies necessary to perform the functions described above, including but not limited to:

- Suitable office furniture
- Computer and associated equipment, including data lines, internet service, etc,
- Printer
- Telephone and telephone service
- Facsimile and facsimile service

- Legal research services, whether on-line or otherwise
- All necessary supplies

## 5. SPECIAL REQUIREMENTS

- A. Consideration will be given to legal services provider which has demonstrated experience and success with:
  - providing counseling and referral services for low-income clients and persons with disabilities
  - hiring and supervising a staff attorney who will function in an independent location
  - providing regular supervision and oversight of the staff attorney
  - recruiting and mentoring volunteer attorneys
  - building collaborations with other agencies, including social service agencies (social services on staff are preferable) providing limited-scope representation
- B. The legal services provider must maintain malpractice insurance that will cover the staff attorney, any supervising attorneys, and any volunteer attorneys, including those who accept cases for full or limited-scope placement through the Federal Pro Bono Project, in the course of their work for the *pro se* assistance program.
- C. The staff attorney assigned to this project must be admitted to practice in the state of California, preferably in the Northern District of California. Experience in the following areas is preferred though not necessary:
  - employment law and civil rights
  - working with low income clients
  - working with clients with mental health issues
- D. The legal services provider must report regularly on the progress of the *pro se* assistance project and work with court departments, such as the clerk's office and the ADR program, to ensure that it is meeting the needs of the court.

## 6. LOCATION OF PERFORMANCE

The San Jose division's physical location is:

United States District Court  
 280 South First Street  
 San Jose, CA. 95113  
 Hours of business are 9:00 a.m. to 5:00 p.m.

## **7. ADDITIONAL INFORMATION**

Attached for reference are the Guidelines for the Federal Pro Bono Project adopted by the U.S. District Court for the Northern District of California and General Order #25, which may be modified as appropriate in the future.